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ABSTRACT

Supporting performance objective 11 of the V-TECS (Vocational-Technical Education Consortium of States) Secretarial Catalog, both a set of student materials and an instructor's manual on preparing a day's schedule for an employer are included in this packet. (This packet is the first in a set of four on coordinating and performing activities for employers--CE 016 977-980.) The student materials include instructions and materials needed to prepare a five-day schedule for an employer using a business calendar. The instructor's final checklist is also included. The instructor's manual includes notes to the teacher, answer keys, and a script for use with a filmstrip and cassette tape to accompany the lesson. The materials are designed for self-paced individual instruction and may be adapted for use with large groups. (A separate booklet--CE 016 911--lists contents for the four packets in this set along with those in several other sets--seventy-eight packets in all--based on the same V-TECS catalog.) (JT)

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COORDINATING AND PERFORMING ACTIVITIES FOR EMPLOYER

PREPARE A DAY'S SCHEDULE

STUDENT MANUAL

These materials support
Performance Objective 11 of the
V-TECS Secretarial Catalog

Prepared By

Maleeta M. Jones

Published by

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NATIONAL INSTITUTE OF EDUCATION

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OE 016 977

PREPARE A DAY'S SCHEDULE FOR EMPLOYER

PLANNING ACTIVITIES FOR EMPLOYER

INTRODUCTION

In an executive secretarial position one of your duties will be to plan activities for your employer. This includes setting up appointments for customers, making sure that your employer has ample time with each one, and that there are no conflicts. It also includes little things like making sure your employer is aware of all appointments. The use of a desk calendar for the secretary and boss facilitates the task.

DIRECTIONS

This task should not be undertaken until you and your instructor feel you are capable of handling responsibility and working in a supervisory capacity. If you feel you are ready to handle such work, read the objective below and talk to your instructor about completing the check-out activities which follow.

OBJECTIVE

Given an office situation requiring the preparation of a day's schedule for an employer for five days, make a schedule for each day. A checklist will be used to rate performance. All items must receive an acceptable rating.

INSTRUCTION SHEET I

The daily calendar is one of the secretary's most valuable aids. It is used to record items that should occur on a specific date. A single calendar page, which you will be using in this activity, is a common type of desk calendar. The daily calendar, illustrated on the following page, allows the secretary to record items more exactly and with more detail.

Before setting up desk calendars for you and your boss, familiarize yourself with the routine of the office. For example, does your supervisor plan committees? If so, what type and who is a member? Is a special project or board meeting consuming a large amount of company time? Do personal appointments or club meetings interfere with the supervisor's appointments? Does a family crisis or professional organization demand immediate attention?

Once you understand the functions and activities of your supervisor, you are ready to begin arranging the desk calendar. Friends, salespersons, board members, family, and company staff require appointments of your supervisor via phone calls, mail requests, and walk-ins. Here are some suggestions on how to handle the calendar.

Always furnish complete information when scheduling appointments. Record the person's name and company, the reason for the visit, the date and time of the appointment, and the location (if it is not in the supervisor's office). Complete a calendar for your supervisor and another one for yourself. Only include pertinent information on the supervisor's calendar, and extra details on your calendar. Remember, cancellations require you to change both calendars.

When selecting the date and time of the appointment, be sure to consider the supervisor's preferences. Try to suggest a mutually acceptable time for the appointment. Avoid last minute appointments, late afternoon appointments, Monday morning appointments, or appointments after a supervisor's extended absence.

View the filmstrip entitled "The Importance of a Calendar," and then proceed to the Check-Out Activities.

THURSDAY
15
NOV. 19--

-APPOINTMENTS-

8:00
8:30
9:00
9:30
10:00
10:30
11:00
11:30
12:00
12:30
1:00
1:30
2:00
2:30
3:00
3:30
4:00
4:30
5:00

THURSDAY

19--NOVEMBER 19--

S	M	T	W	T	F	S

15

NOV. 19--

15 - THURSDAY, NOVEMBER 15, 19-- -350

CHECK-OUT ACTIVITIES

You are employed by Abaco, Incorporated as a secretary to Mr. Robert Boyd, who is manager. Mr. Boyd has asked you to prepare his weekly calendar on a celendar page and a daily appointment page so that his appointments can be detailed specifically. Since Mr. Boyd is a very discriminating boss, you will have to be very careful to insure that his weekly agenda is prepared accurately.

You are given four telephone messages and a cancellation. Using forms provided, list in the appropriate places the following information:

Board meeting every Tuesday at 3 p.m.
Usually is gone for lunch between 11:30 and 1:00
Weekly earnings report must be completed by 4 on Fridays.
Prefers to see new customers (and prospective employees) on Tuesdays and Thursdays (10-12) and Wednesday afternoons (3-4)
Staff meeting every Monday at 10
Wishes coffee served at the staff meeting at 9:45
You are required to take minutes at the staff meeting.
Wishes to place his own telephone calls, if not too busy
Is out of town the first Wednesday of every month for a regional sales meeting of branch managers
Works on material Friday afternoon (3-5) for Monday's staff meeting
Attends Rotary Club the first Tuesday of each month 1-2
Takes his coffee break at 10-10:15 and 3-3:15
Has lunch with J. M. Murray, comptroller of the firm every Thursday
Takes his wife to lunch on Fridays and stays 1/2 hour longer
Gives dictation between 8:15 and 9:30 daily
You have a National Secretary's Association meeting on the third Thursday of every month. The NSA is giving a luncheon at this month's meeting at which secretaries are encouraged to bring their boss; Mr. Boyd has agreed to attend.

Schedule appointments for Mr. Robert Knoerr and Mrs. Dorothy Kelly, new customers; Ms. Angie Farr and Mr. Donald Davenport, applicants for accounting position; Mrs. Debbie Lake and Mr. Kevin Thomas, applicants for the sales position.

Plan these activities around the third week in February. Prepare Mr. Boyd's calendar, your calendar, and the appointment pages. Then, submit your work to your instructor for evaluation.

MESSAGE

TO: Mr. Boyd

YOU RECEIVED A CALL FROM: John Rogers

OF (FIRM OR DEPT NAME): Branch Office

TELEPHONE NUMBER	EXTENSION	TIME	DATE
298-3224	3115	11 Am	2/13

Will Call Again ☐ Please Call ☑

Needs to talk with you before Board meeting tomorrow. I told him you would call at 2:00 this afternoon.

(Sec.)
(SIGNATURE)

MESSAGE

XA–5

TO: Mr. Boyd

YOU RECEIVED A CALL FROM: Ann Reid

OF (FIRM OR DEPT NAME): Accounting

TELEPHONE NUMBER	EXTENSION	TIME	DATE
	248	1 pm	2/13

Will Call Again ☐ Please Call ☐

Ann will come by at 4:00 today to discuss new travel allotments with you.

(Sec.)
(SIGNATURE)

MESSAGE

TO: Mr. Boyd

YOU RECEIVED A CALL FROM: Mr. Robert Knoerr

OF (FIRM OR DEPT NAME): Traco, Inc., Greene, Ga.

TELEPHONE NUMBER	EXTENSION	TIME	DATE
(414) 117-3362		10:15	2/17

Will Call Again ☐ Please Call ☑

Mr. Knoerr, our new customer, would like to review his order with you.

(Sec.)
(SIGNATURE)

MESSAGE

TO: Mr. Boyd

YOU RECEIVED A CALL FROM: Mr. Kevin Thomas

OF (FIRM OR DEPT NAME): Sumter, SC

TELEPHONE NUMBER	EXTENSION	TIME	DATE
298-6617		10:45	2/17

Will Call Again ☐ Please Call ☐

Mr. Thomas would like to withdraw his name from the list of applicants you are considering for the sales position.

(Sec.)
(SIGNATURE)

February 13, 19—

Mr. Robert Boyd, Manager
Abaco, Inc.
1729 East Gervais
Charleston, SC 29403

Dear Mr. Boyd:

Please excuse my late reply. Unfortunately I will be unable to meet with you and discuss the accounting position on Thursday, February 16.

There has been a death in the family and I must fly to New York. I will call you immediately upon my return. Thanks for your understanding.

Sincerely,

Donald Davenport

Donald Davenport

XA-7

MONTH

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
		1	2	3
6	7	8	9	10
13	14	15	16	17
20	21	22	23	24
27	28			

APPOINTMENTS FOR _____

	Engagements	Memorandums
9:00		
9:30		
10:00		
10:30		
11:00		
11:30		
12:00		
12:30		
1:00		
1:30		
2:00		
2:30		
3:00		
3:30		
4:00		
4:30		

Student _____

Date _____

PREPARE A DAY'S SCHEDULE FOR EMPLOYER

Instructor's Final Checklist

Check the student's performance in the following elements of preparing a day's schedule for employer.

Place an X in the appropriate box indicating not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, the item was impossible to complete, place an X in the "Not Applicable" box.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will discuss this and decide which learning activities must be repeated.

		Student Performance			
		Not Applicable	Not Accomplished	Partially Accomplished	Fully Accomplished
1.	Scheduled sufficient time for appointments	[ ]	[ ]	[ ]	[ ]
2.	Considered employer's preferences	[ ]	[ ]	[ ]	[ ]
3.	Considered employer's time constraints	[ ]	[ ]	[ ]	[ ]
4.	Gave copy to employer (either on calendar or separate sheet)	[ ]	[ ]	[ ]	[ ]
5.	Marked secretary's personal calendar	[ ]	[ ]	[ ]	[ ]
6.	Recorded cancellation on both calendars	[ ]	[ ]	[ ]	[ ]
7.	Reminded employer of schedule	[ ]	[ ]	[ ]	[ ]
8.	Anticipated and provided needed information and supplies	[ ]	[ ]	[ ]	[ ]

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COORDINATING AND PERFORMING ACTIVITIES FOR EMPLOYER

PREPARE A DAY'S SCHEDULE

TEACHER'S MANUAL

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NOTES TO TEACHER

A filmstrip on the importance of a calendar in the modern office accompanies this unit. A script for the filmstrip is provided in your manual for your use in recording on a cassette tape.

You will need to duplicate the following perishable items located in the student manual:

Calendar, page 7 (need 2 for each student– one for secretary, one for boss)
Appointment Schedule, page 8 (need 10 for each student – one for each day of the week for secretary and boss)
Instructor's Checklist, page 9

A sheet of blank telephone message forms is provided in your manual should you care to vary the activity.

Keys for the Check-Out Activities are provided. Answers could vary on the appointment schedule and fill-in information; use your judgement in evaluating each student's performance.

MESSAGE

TO:

YOU RECEIVED A CALL FROM

OF: (FIRM OR DEPT. NAME)

TELEPHONE NUMBER	EXTENSION	TIME	DATE

Will Call Again ☐ Please Call ☐

(SIGNATURE)

MESSAGE

TO:

YOU RECEIVED A CALL FROM

OF: (FIRM OR DEPT. NAME)

TELEPHONE NUMBER	EXTENSION	TIME	DATE

Will Call Again ☐ Please Call ☐

(SIGNATURE)

MESSAGE

TO:

YOU RECEIVED A CALL FROM:

OF: (FIRM OR DEPT. NAME)

TELEPHONE NUMBER	EXTENSION	TIME	DATE

Will Call Again ☐ Please Call ☐

(SIGNATURE)

MESSAGE

TO:

YOU RECEIVED A CALL FROM:

OF (FIRM OR DEPT. NAME)

TELEPHONE NUMBER	EXTENSION	TIME	DATE

Will Call Again ☐ Please Call ☐

(SIGNATURE)

XA-13

MONTH February — Mr. Boyd

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
		1	2	3
6	7	8	9	10
13 10:00 - Staff mtg. 4:00 - Ann Reid	14 10:15 - Ms. Angie Tan 11:15 - Mr. Robert Knoen 3:00 - Board mtg.	15 1:30 - Call Mr Murray 3:00 Mrs Dorothy Kelly 3:30 - Mr. Kevin Thomas	16 10:00 - Mrs. Debbie Lake ~~10:45 - Mr. Donald Davenport~~ 11:30 - 1:00 - NSA luncheon meeting	17 2:00 - Call Mr Knoen Work on weekly earning Report Gather material for monday staff meeting
20	21	22	23	24
27	28			

XA-14

MONTH February — Secretary

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
		1	2	3
6	7	8	9	10
13 8:15-9:30 dictation 10:00 - Staff meeting Take minutes, Serve Coffee at 9:45 Remind Mr Boyd to call John Rogers at 2 4:00 - Ann Reid	14 8:15-9.30 dictation 10:15 - Ms Angie Tan 11:15 - Mr Robert Rivera 3:00 - Board meeting - have agenda and reports ready Send out minutes of Staff Mtg.	15 8:15-9:30 dictation 3:00 - Mrs Dorothy Kelly 3:30 - Mr Kevin Thomas	16 8:15-9:30 dictation 10:00 - Mrs. Debbie Lake ~~10:45 - Mr Donald Davenport~~ 11:30 - 1:00 - NSA Luncheon meeting. Mr Boyd to attend.	17 8:15-9:30 dictation 2:00 call Mr Hixson Type weekly earnings Rept have ready by 4 pm Assist Mr Boyd with together for Staff mtg. getting material
20	21	22	23	24
27	28			

X A–15

Mr Boyd

APPOINTMENTS FOR Monday, February 13

	Engagements	Memorandums
9:00	Secretary	dictation
9:30		Gather material for staff mtg. Review agenda
10:00	Staff meeting	presiding
10:30		
11:00		
11:30	Lunch	
12:00		
12:30		
1:00		
1:30		
2:00	Call John Rogers	298-3224, Ext. 3115
2:30		
3:00	Break	
3:30		
4:00	Ann Reid, Acct. Dept.	Discuss New Travel allotments
4:30		

Mr. Boyd APPOINTMENTS FOR Tuesday, February 14

	Engagements	Memorandums
9:00	Secretary	Dictation – send out memo to all staff on new travel allotment.
9:30		
10:00	Break	
10:15	Ms. Angie Farr	Interview for accounting position
10:30		
11:00		
11:15	Mr. Robert Knoerr, Tracs, Inc.	New customer
11:30		
12:00	Lunch	
12:30		
1:00		
1:30	Office	Gather materials for Board meeting
2:00		
2:30		
3:00	Board Meeting	
3:30		
4:00		
4:30		

Mr. Boyd

APPOINTMENTS FOR Wednesday, February 15

	Engagements	Memorandums
9:00	Secretary	dictation
9:30		
10:00	Break	
10:30		
11:00		
11:30	Lunch	
12:00		
12:30		
1:00		
1:30	Call J. M. Murray, comp. Ext. 204	cancel usual lunch engagement with Mr. Murray for tomorrow; will be attending NSA luncheon
2:00		
2:30	Break	
3:00	Mrs. Dorothy Kelly	New customer
3:30	Mr. Kevin Thomas	Interview for sales position
4:00		
4:30	Office work	update weekly earnings report

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Mr. Boyd APPOINTMENTS FOR ~~Thursday~~, February 16

	Engagements	Memorandums
9:00	Secretary	dictation
9:30		
10:00	Mrs. Debbie Lake	applicant for sales position
10:30		
10:45	~~Mr. Donald Davenport~~	~~applicant for acct. position~~
11:00		
11:30	Lunch with Secretary	National Secretary's Assn. luncheon meeting
12:00		
12:30		
1:00		
1:30		
2:00		
2:30		
3:00	Break	
3:30	Office work	
4:00		
4:30		

Mr. Boyd APPOINTMENTS FOR Friday, February 17

	Engagements	Memorandums
9:00	Secretary	dictation
9:30		
10:00	Break	
10:30		
11:00		
11:30	Lunch	Meet Mrs. Boyd
12:00		
12:30		
1:00		
1:30		
2:00	Call Mr. Knoerr	(414) 117-3362 — re. Order
2:30		
3:00	Break	
3:30	Office Work	Complete weekly ~~Timings~~ Report
4:00		
4:30		Gather material for Monday staff meeting

Secretary APPOINTMENTS FOR Monday, February 13

	Engagements	Memorandums
9:00	Mr. Boyd's Office	dictation
9:30		Check meeting room to be
9:45	Serve coffee at staff mtg.	sure everything is set up.
10:00	Staff meeting	Take minutes
10:30		
11:00		
11:30	Mr. Boyd – Lunch	
12:00	Lunch	meet Jane at Ramada
12:30		
1:00	General Office work	type minutes of staff meeting
1:30		
2:00	Remind Mr. Boyd to call John Rogers	298-3224, Ext. 3115
2:30		
2:45	Break	
3:00		Have Mr. Boyd approve minutes -- then mimeograph
3:30		
4:00	Ann Reid from Acct.	Conf. with Mr. Boyd re. new travel allotments
4:30		

Secretary APPOINTMENTS FOR Tuesday, February 14

	Engagements	Memorandums
9:00	Mr. Boyd's Office	dictation
9:30		
9:45	Break	
10:00		
10:15	Ms. Angie Farr	applicant for accounting position
10:30		
11:00		Type agenda for Board Mtg.
11:15	Mr. Robert Knoen, Trace, Inc.	New customer
11:30		
12:00	Lunch	
12:30		
1:00		Have agenda and reports ready for Mr. Boyd to take to Board meeting
1:30		
2:00		
2:30	Break	
3:00	Mr. Boyd has Board Meeting	
3:30		Send out minutes of Staff meeting
4:00		
4:30		

Secretary APPOINTMENTS FOR Wednesday, February 15

	Engagements	Memorandums
9:00	Mr. Boyd's Office	dictation
9:30		
10:00	break	
10:30		collect earnings reports to date – get in order and give to Mr. Boyd – for updating.
11:00		
11:30	Mr. Boyd – Lunch	
12:00	Lunch	
:30		
1:00		
1:30	Remind Mr. Boyd to call Mr. Murray, Comp.	cancel lunch with him for tomorrow; NSA luncheon
2:00		
2:30	Break	
3:00	Mr. Boyd to see Mrs. Dorothy Kelly – New Customer	
3:30	Mr. Boyd to see Mr. Kevin Thomas, applicant for sales position	
4:00		
4:30		

Secretary APPOINTMENTS FOR Thursday, February 16

	Engagements	Memorandums
9:00	Mr. Boyd's Office	dictation
9:30		
10:00	Mr. Boyd has appointment with Break	Mrs. Debbie Lake, applicant for Sales position
10:30		
10:45	Remind Mr. Boyd that Mr. Davenport cancelled his	
11:00		appointment.
11:30	Lunch with Mr. Boyd	National Secretary's Assn. Luncheon Meeting
12:00		
12:30		
1:00		
1:30		
2:00		
2:30		
3:00	Break	
3:30		
4:00		
4:30		

X A–24

Secretary APPOINTMENTS FOR Friday, February 17

	Engagements	Memorandums
9:00	Mr. Boyd's Office	dictation
9:30		
10:00	Break	
10:30		Collect remaining earnings reports, get in order, and give to Mr. Boyd for updating.
11:00		
11:30	Mr. Boyd – Lunch with Wife	11:30 – 1:30
12:00	Lunch	
12:30		
1:00		
1:30		
2:00	Remind Mr. Boyd to call	Mr. Knoerr, (414) 117-3362 re. Order
2:30		Type weekly Earnings Report; Have ready by 4pm.
3:00	Break	
3:30		Assist Mr Boyd with getting material ready for Staff conference Monday.
4:00		
4:30		

PLANNING ACTIVITIES FOR EMPLOYER
IMPORTANCE OF CALENDAR

SCRIPT

1. Executive Secretary-Calendar Keeper?

2. Some people are under the impression that all an executive secretary does is type...

3. and take shorthand that will later be transcribed at the typewriter.

4. But a secretary is not an office prisoner chained to the typewriter or desk.

5. The secretary does many other things. But let's see what happens in the office of a secretary who only types.

6. I forgot I had a luncheon date with H. J. Rogers of Adams, Inc. to close a $4 million dollar contract and now we've lost it. Why didn't you remind me?

7. Angry Boss:
   What are all these people doing here?

   Secretary:
   They all say they have a nine o'clock appointment to see you.

8. Dr. Goldberg, one of our most valuable customers had a dinner party Saturday. I was invited, but it slipped my mind. Why can't I remember anything?

9. Now let's see what happens in the office of a secretary who does what should be done.

10. Thanks for noting my "second chance" to meet with Rogers. I just had lunch with him at the Bon Appetit Club and closed the deal. I sure am glad you're keeping my calendar up to date.

11. Things have been running so smoothly since we started the "double calendar" system.

12. Secretary: I'm happy to do it for you. You have so many demanding things on your mind, and as a result, we're both better organized.

13. Secretary (Thinking): Our customers seem to be in a better mood since we started recording and staggering appointments.

14. I'm not half as tired or frustrated at the end of the day as I was before. It's amazing what a little organization and cooperation can do.

15. Now let me make the usual entries for next week before I go home.

16. Secretary (Thinking): Ms. Litchfield meets with the Board of Directors at 11:00 on Monday. She'll need 10 financial statements run off for the members.

17. Secretary (Thinking): Mr. McCall has a 10:30 appointment with Ms. Litchfield on Tuesday. Perhaps Lon Presnell can drop by those accounts receivable printouts before noon. I'd better call!

18. Secretary (Thinking): The auditor will be in to check our records at 8 a.m. on Wednesday. Lon needs a ride home at 4:00.

19. Secretary (Thinking): Buffet dinner at the Fox Club at 7 p.m. on Thursday. Ms. Litchfield is the guest speaker. Will she need transparencies made for her presentation?

20. Secretary (Thinking): Now I'll make the same entries on Ms. Litchfield's calendar.

21. Closing time – Happy secretary and boss leave office together.